



Research Monitor

February 13, 2019



What is ResearchMonitor?

- Usage monitoring
 - manage your external online database subscriptions
 - your internal intranets & knowledge base portals
- Access Control & Password Management
- Contract Management



Who produces ResearchMonitor?

Named after the Lewes Priory in East Sussex, Priory Solutions was founded in 2003 by legal technologists Peter Borchers and Phillip Markwick.

Drawing from their legal sector experience they set out to create an electronic resource management solution which later evolved into our ResearchMonitor product. Philip left the business in 2007 shortly before now-CTO and co-director Rory Kingan joined Priory Solutions in 2008.

With an expanding client base in the UK and US we set about extending our product range over the next few years, adding additional library and resource management solutions to our suite of products. ResearchPath was released in 2011, SmartRecharge and ResearchHub in 2013 and most recently Quest was released in early 2015.

Being a small team we pride ourselves on punching above our weight in our scope of products, calibre of client base, and quality of client relationships built on excellent customer service. We strive to retain the energy of a start-up coupled with the ability to produce systems trusted by our large corporate clients.

We are privileged to have eight of the top ten global law firms as clients and have a client retention rate of approaching 100% - a metric we are dedicated to maintaining.


Our strong growth could not have been achieved without an exceptional team, which has expanded to be located in eight locations on four continents. With ten nationalities represented on the team we can safely call ourselves a global business. With core offices in London, Cape Town and Minneapolis we aim to find outstanding people to join our team regardless of their location.

We are looking forward to the next ten years of growth in partnership with our fantastic clients.

January 2018

TRG Buys Screen, Creating Global Data Management Vendor

The combined vendors will be able to offer a range of products for different client types and use cases.



Max Bowie
@MaxBowie

18 Jan 2018


The combined vendor will have just over 100 staff (around 50 each from both companies) with offices in the US, the UK, the Netherlands, France, Germany, Switzerland, Singapore and New Zealand, and will serve a combined base of more than 300 clients.

Officials say the move was driven by the potential to offer a broader range of products and services, a truly global support presence, and to be able to focus more on strategy and product development than on duplication and competition.

November 2018

TRG Screen Receives Investment From Pamlico Capital

Investment supports TRG's continued success as it enters the next phase of growth




NEWS PROVIDED BY
TRG Screen
Nov 07, 2018, 08:31 ET

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NEW YORK and CHARLOTTE, N.C., Nov. 7, 2018 /PRNewswire/ -- TRG Screen, a leading provider of enterprise subscription management solutions, announced that it has entered into an agreement to receive an investment from affiliates of Pamlico Capital ("Pamlico"). Terms of the transaction were not disclosed.

With Pamlico's backing, TRG Screen will accelerate its investment in its unique portfolio of spend and usage capabilities, adding new solutions that bring breadth and depth to the subscription lifecycle, and continuing expansion into new expense categories and client segments.

TRG is partnering with Pamlico at an exciting time. Following several years of



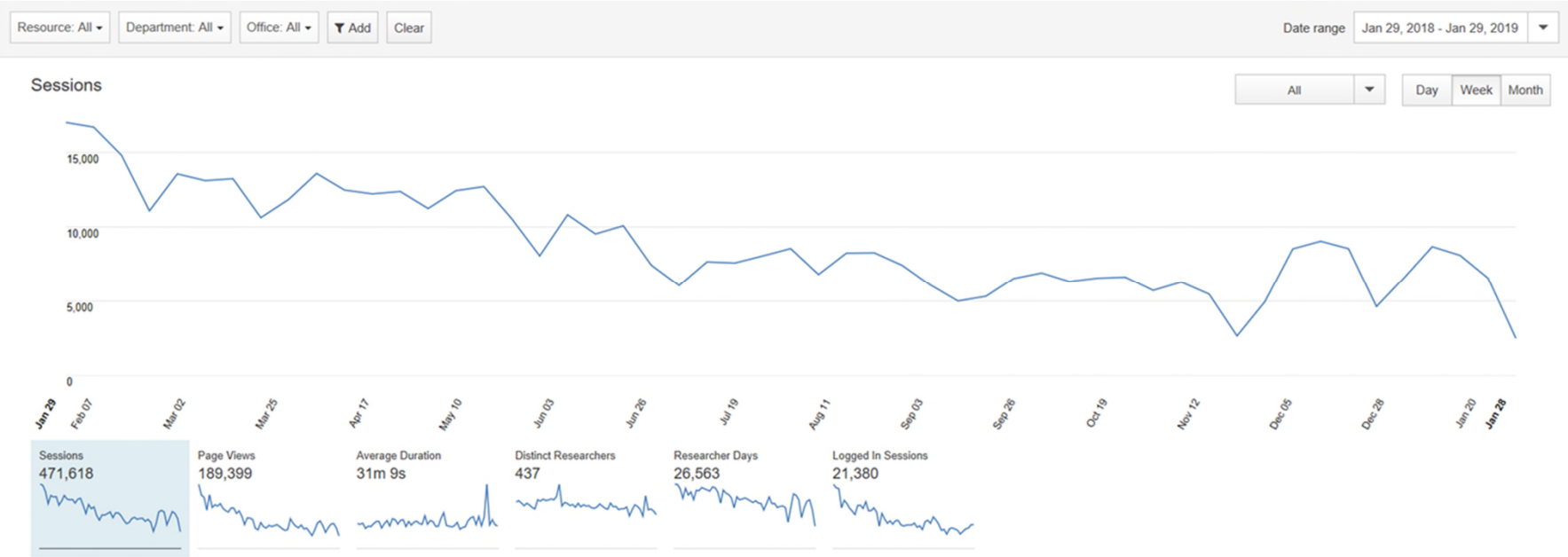
What is Usage Monitoring?

Usage Monitoring seamlessly records detailed information about the sources and databases searched, search terms used and result counts.

Key Features

- Reports usage across any web-based service, including internal firm systems.
- Reports usage by service, department, office, job title, and individuals.
- Usage is recorded down to individual level, regardless of whether users log in or use IP authentication.

Overall usage

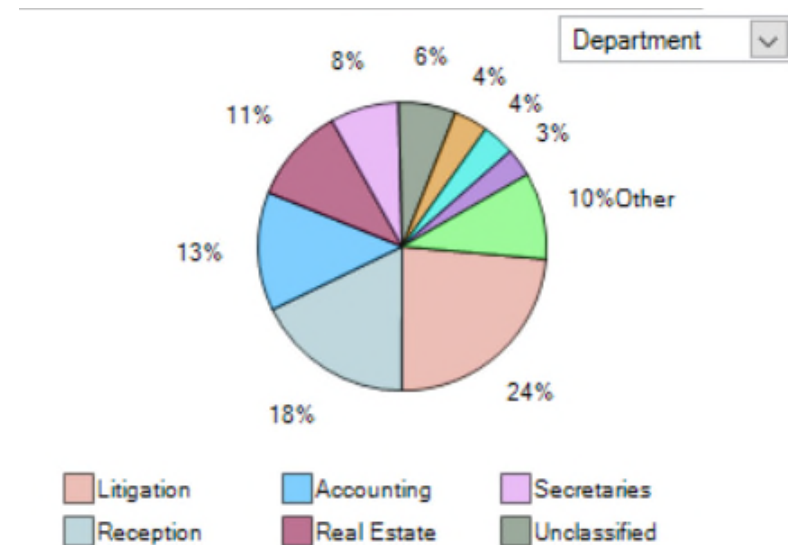


Reporting capabilities

Used Resources

Resource	Sessions	Activities	Users
Facebook	10387	730	121
Google	9175	0	129
Twitter	5332	5123	105
Bing	3971	0	131
Herrick Intranet SupportResour...	1141	104	100
Herrick Intranet Search	588	1463	94
New York Times	324	1048	43
Linked In	281	692	49

Track whatever you are interested in

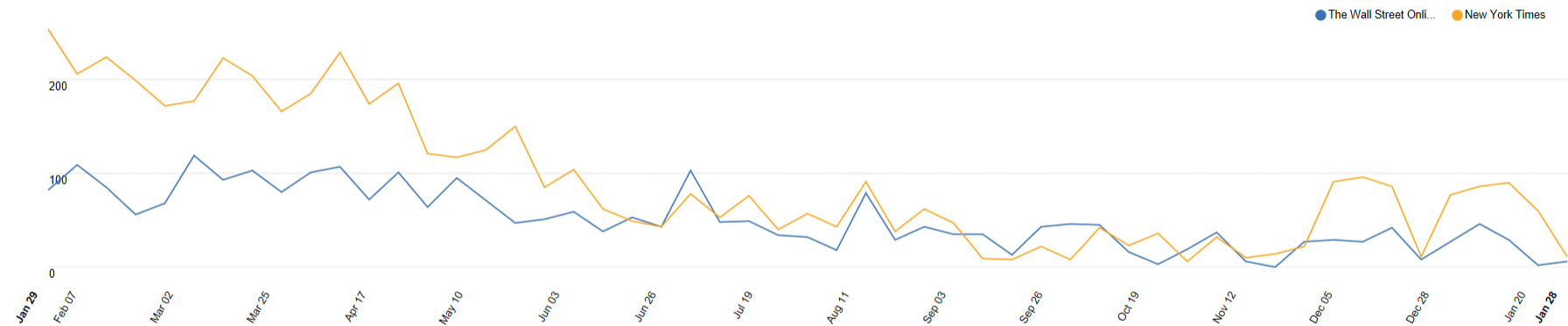


Comparing usage of two resources – NYT vs WSJ

Filtered by Resource: New York Times, The Wall Street Online Journal

Sessions by resource

Resource ▼ Day Week Month

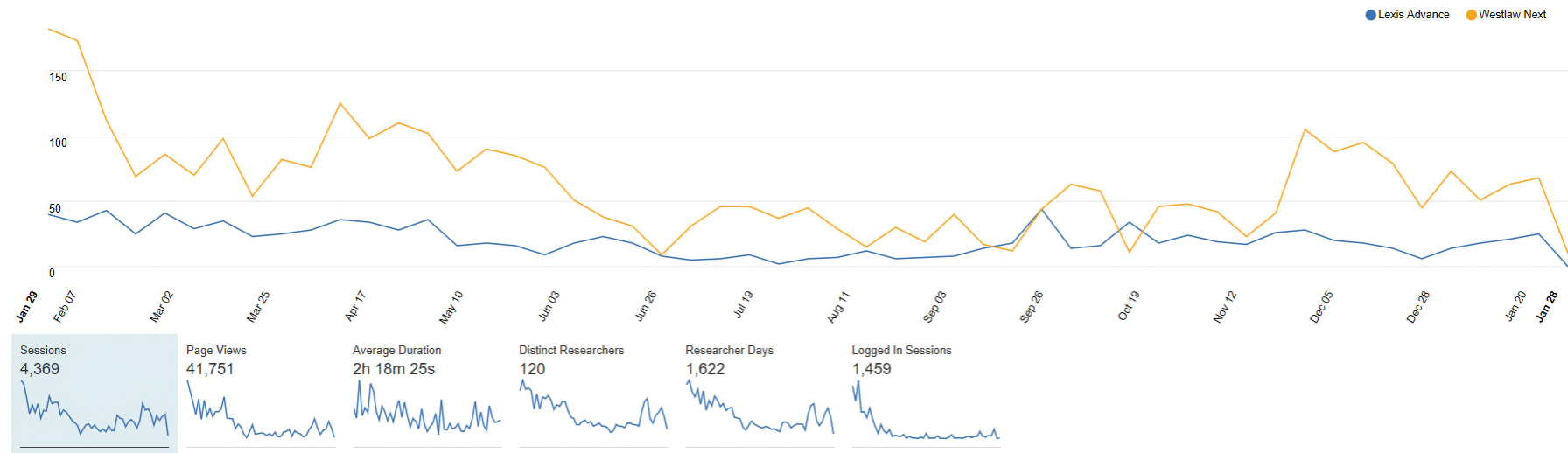


Comparing usage of two resources – Lexis vs Westlaw

Filtered by Resource: Lexis Advance, Westlaw Next

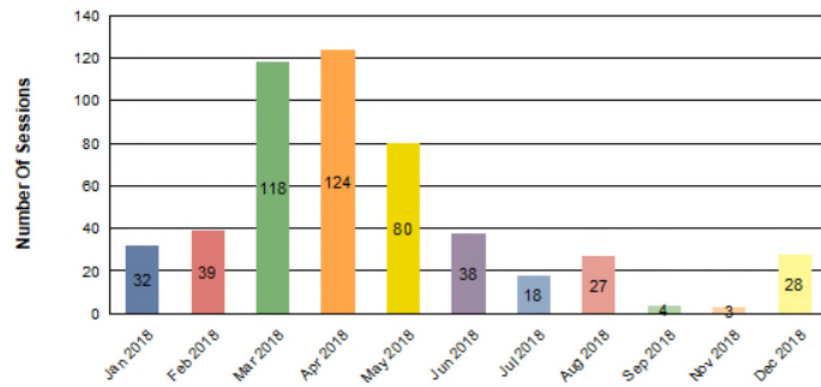
Sessions by resource

Resource ▼ Day Week Month

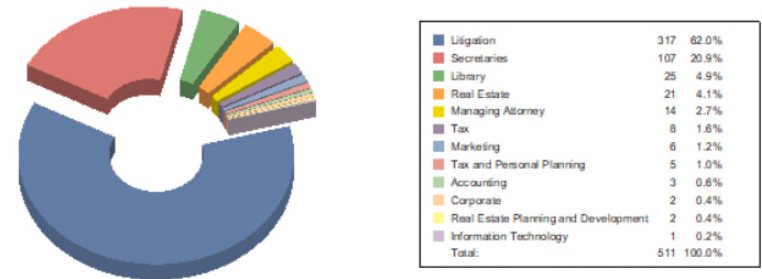


Usage – Monthly or by Department

Monthly Usage Trend

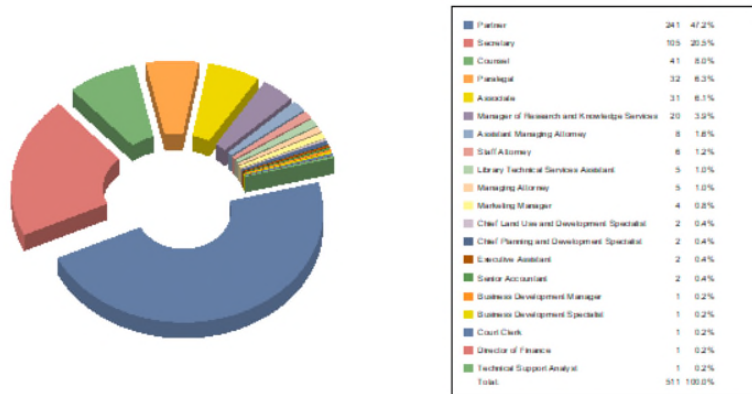


Usage By Departments



Usage – by Title or Individual User

Usage By Job Title



Top 20 Researchers

Researcher	Sessions
Rocco, Victor (Litigation)	169
Trachtenberg, Andrea (Secretaries)	102
Skidmore, Jonathan (Litigation)	28
Werbin, Barry (Litigation)	24
Rosen, Nathan (Library)	20
D'Angelo, Jason (Litigation)	11
Selbst, Stephen (Litigation)	10
Im, Richard (Litigation)	9
Tuchman, Louis (Tax)	8
Levin, Mara (Litigation)	7
Newman, Jared (Litigation)	6
Berengarten, Michael (Litigation)	6
Berger, Alexander (Real Estate)	6
Pordes, Jennifer (Managing Attorney)	5
John, Laina (Managing Attorney)	5
Hirsch, Ross (Litigation)	5
Grillo, Allison (Library)	5
Bazian, Samuel (Litigation)	4
Poddar, Shivani (Litigation)	4
Jakoby, Arthur (Litigation)	4

Usage – what did they look at and how

Activity Meta Data Values



<u>Resource:</u>	New York Times
<u>Activity Date:</u>	07-Dec-2018 12:01
<u>Action:</u>	Page View
<u>Employee:</u>	Tuchman, Louis

<u>Attribute</u>	<u>AttributeValue</u>
Page Title	Art Collectors Find Safe Harbor in Delaware's Tax Laws - The New York Times
URL	https://www.nytimes.com/2015/10/26/arts/design/art-collectors-find-safe-harbor-in-delawares-tax-laws.html

What is Access Control & Password Management?

Access Control & Password Management eliminates wasted researcher time by automatically logging in users to online services they should have access to. Users no longer need to remember passwords and you can control access to services on an individual or group level where needed.

Key Features

- Centrally store username and passwords for the entire firm, groups or individuals.
- Collect and store logon details when researchers access the database
- Prevent users without entitlement from accessing services
- Ability to display messages when accessing services

Access Control & Password Management

Firm wide username/passwords

Bankers Almanac

Username

BAenterprise

Password

Bloomberg Businessweek

Username

FirmwideUsername

Password

APasswordNoOneKnows

BNA Banking Report

Username

login451

Password

CCH China Tax and Intelligence

Username

wkUser1

Password

CreditSights

Username

SampleUser

Password

SamplePass

Individual users username/passwords

User Values			
Billing Id	Name	Username	Password
00002	Anderson, Abby	sampleUser	samplePass
04626	Anderson, Barb	user123	pass456
06236	Calhoun, Bret	BretCal	passman1
02071	Fitzgerald, Ann	login567	pass567
123	GawneMark, Devin	Carol123	Calhoun11
02590	Johnson, Antonio	login999	pass111
Total Items: 6			

What is Client Validation & Cost Recovery?

Client Validation & Cost Recovery validates client references entered in any online service against your current matter list, thus ensuring only valid references are used. Feeds the information to your billing system, eliminating unnecessary manual effort and maximizing your recovery rates.

Key Features

- Researchers can select from their most recent codes, search for or enter a number directly.
- Validates against your current matter or deal code list, ensuring references are always valid
- Optionally request an activity description when using non-billable client references.
- Charges are recorded as they are incurred and stored centrally for reporting.
- Charges automatically sent to your billing or disbursement system
- Library administrators can easily configure costs for each service and type of activity.
- Rate cards can be set to apply discounts, include overheads or to simplify vendors' complex pricing.
- Can dramatically increase your recovery rates without changing your existing processes.

Client Validation & Cost Recovery

THOMSON REUTERS WESTLAW

Welcome, Nathan Rosen.

Client ID:

Return to your recent research:

Recent Matters

- 99999-0070 - Firm non-billable - ARTICLES / SPEECHES
- 88200-0067 - Herrick, Feinstein LLP (p ... - New Business Intake Research
- 99999-0006 - Firm non-billable - MARKETING/BUSINESS DEVELOPMENT
- 99999-0001 - Firm non-billable - ADMINISTRATION
- 17272-0002 - New York Racing Association - Tax Advice
- 15658-0013 - ED&F Man Capital Markets, Inc. - Kuang Alpha Trading Fund I
- 16046-0004 - Firestone Building Produc ... - Liberty Mutual Subrogee o ...
- 17272-0005 - New York Racing Association - AML Issues and Analysis
- 17888-0001 - Jolsen, Inc. and Madsen, ... - Pirraglia, John v. Jolsen ...

New York City, N.Y., Rules, Tit. 19, § 23-02

New York City, N.Y., Rules, Tit. 19, § 23-02

... Rules, Tit. 19, § 23-03

... & Annos

Ch. 44B, Art. II, Refs & Annos

(6)


Language

Insights for New York -

ork (State & Fed.)

Search Type: Plain Language
Content: New York City Municipal Materials - Regulations

Search

 **HERRICK**

> Matter Number

> Client Name

> Matter Name

Matter Number	Client Name	Matter Name
00176-0002	Cohen M.D., Herrick	Great Neck Pediatric Associates
88000-0105	Herrick, Feinstein Potential Client	Chanales, Sheldon
88000-0106	Herrick, Feinstein Potential Client	Schwartz, Belinda
88000-0108	Herrick, Feinstein Potential Client	Brodie, Stephen D.
88000-0120	Herrick, Feinstein Potential Client	Feuerstein, Harvey S.
88000-0127	Herrick, Feinstein Potential Client	Selbst, Stephen B.
88000-0140	Herrick, Feinstein Potential Client	Heitner, Michael
88000-0150	Herrick, Feinstein Potential Client	Herman, David R.

What is Contract Management?


Contract Management offers a single standard interface to record contract details, as well as provides the opportunity to view contract details along usage statics.


Eliminates auto-renewal of subscription services and reduces requirements for multiple copies of contract documents.


Key Features


- Automatic contract renewal notices via email
- Comprehensive set of contract details
- Links to electronic copy of contract documents.


Contract Management


 ResearchMonitor

 Analytics

 Passwords

 Reports

 Contracts

 Admin

RMVM\Sales | Help

Contracts

Store all of your vendor agreements in one place.

filter

☐ Show old contracts

Contract	est	Type
Cadence		\$
Capital Track		\$
Courthouse News Service (multiple jurisdictions)		\$
Dave Institute for Excellence		
FactSet		1,000,000 \$
IDS Employment Law Brief		\$
Moodys	3/1/2016	12/31/2017 850,000 \$
PLC UK		\$
The Capitol Forum		\$



Contract Management

ResearchMonitor

Analytics

Passwords

Reports

Contracts

Admin

Contracts

Moody's

Contract Details

This contract ends on 12/31/2017 (90 days)

Primary Contact	John Smith	License Count	2 allocated
Department	Banking	Contract Cost	\$ 850,000.00 - 1 year
License Type		Auto Renewals	Yes
Contract Start	3/1/2016	Contract Action Date	10/2/2017
Contract End	12/31/2017	Number of People Accessing	0 users in last 30 days
Publisher	Moody's	Send Reminder Email	100 days before renewal to devin.gawnemark@priorysolutions.com
Publisher Address	123 Street, New City, NY, USA		

Documents

Terms Document

background - surface.png

Resources

No resources assigned to this contract



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